



CFA Institute

CFA INSTITUTE RESEARCH CHALLENGE

INDUSTRY MENTOR AND GRADERS

Industry Mentor

Each team will be provided one industry mentor.

- a. The industry mentor will be selected by the local level host.
- b. The industry mentor must agree to abide by the [CFA Institute Code of Ethics and Standards of Professional Conduct](#).
- c. The industry mentor may not conduct any analysis for the team's written report or presentation.
- d. The industry mentor may not contribute any research or content to either the written report or the presentation other than by providing guidance, direction, suggestions, and feedback.
- e. Students may not receive assistance from additional finance industry professionals.
- f. It is recommended that industry mentors be CFA charterholders.

Time Permitted with Industry Mentor

Teams are permitted to use an industry mentor on substantive matters for limited hours. Teams may spend up to six hours with the industry mentor prior to submitting the written report. For each local, regional, or global final in which the team competes, the industry mentor may contribute an additional two hours. Logistical work, such as arranging meeting space and time, does not count toward the time limit. Failure to abide by these time limits will result in the team's and the faculty advisor's disqualification from the CFA Institute Research Challenge.

Graders

- a. Graders will independently evaluate each written report using the Research Report Evaluation Form (see [Appendix C](#)).
- b. Graders must agree to abide by the [CFA Institute Code of Ethics and Standards of Professional Conduct](#).
- c. Graders will be selected by the event host.
- d. All graders must be investment professionals with experience in writing and reviewing research reports.
- e. It is recommended that graders be CFA charterholders.